



Office of Procurement

University Credit Card Application and Agreement

CARDHOLDER INFORMATION

Employee Status: Full-Time Part-Time

UR ID: _____ UR Email: _____

Last Name: _____ First Name: _____

Job Title: _____ Dept Name: _____

Work Phone: (____) _____ Cell/Home Phone: (____) _____

*Unique 4-digit Number (password) _____ *Mother's Maiden Name _____

**J P Morgan will require this information if you contact them for assistance. To comply with federal regulations of the U. S. Office of Foreign Asset Control, our credit card company requires cardholders' date of birth, home address, and country of citizenship. The Procurement Office will obtain your date of birth and home address from Workday. Please provide your country of citizenship, here: _____*

CARD TYPE AND LIMIT REQUEST

Please provide a brief explanation of how the University Credit Card will be used or why a University Credit Card is needed (Remember **BRAN: Business purpose, Reasonable, Appropriate, and Necessary**):

Department Purchase Card – Procurement Specialist 1
\$20,000 monthly / \$5,000 Per Transaction / 40 Transactions Per Day
Department name as it should appear on the University Credit Card (limited to 21 characters, including spaces): _____

Individual Purchase Card – Procurement Specialist 2
\$30,000 monthly / \$10,000 Per Transaction / 20 Transactions Per Day

Individual Purchase Card (non-PSL1 or 2)
\$5,000 monthly / \$2,500 Per Transaction / 10 Transactions Per Day

Individual Travel Card
\$10,000 monthly / \$2,500 Per Transaction / 10 Transactions Per Day

Request for Customized Limits

Justification for customized limit: _____

Monthly Limit \$ _____ Per Transaction Limit \$ _____ Transactions Per Day _____

UNIVERSITY CREDIT CARD AGREEMENT

Fundamentals of the Program

The University Credit Card is a card owned by the university that may be used for university business, as well as university travel and entertainment expenses. Using a University of Richmond University Credit Card is a responsibility that should not be taken lightly. Continued use of the University Credit Card is contingent upon adherence to the University's policies and procedures. Therefore, it is vital that you read this agreement carefully to ensure that you fully understand the program's key requirements. Your signature on this agreement is acceptance of all elements of this agreement.

Training will be provided by the University Procurement Office, prior to the credit card being issued. The cardholder must comply with any additional training requirements as determined by the University Procurement Office.

Cardholders may assign responsibility for reconciling their credit card transactions to an "Expense Data Entry Specialist" in Workday.

The University may terminate the right to use the University Credit Card at any time, for any reason. The University Credit Card shall be returned to the University Credit Card Program Administrator immediately upon request or termination of employment (including retirement).

If the University Credit Card is lost or stolen, the cardholder will notify the University's Credit Card Program Administrator (creditcards@richmond.edu) and the credit card company, JP Morgan Chase 1-800-270-7760, immediately.

If a University Credit Card is compromised, the cardholder will receive written notification via email from JP Morgan Chase and is required to contact JP Morgan Chase at 1-800-270-7760 in response to the notification.

Program Compliance

Prior to signing this agreement, review the [University Credit Card](#) policy and other related financial policies (listed in the University Credit Card policy's "Related Policies" section), which are located on the [Policy website](#). Additionally, review the [Allowable](#) and [Non-Allowable](#) expenses (listed on the University Finance website). Completing this agreement indicates you have read and agree to adhere to such policies.

- Failure to comply with this and other financial policies may result in actions taken as outlined in the [Reporting and Investigating Suspected Financial Fraud, Waste, and Abuse](#) policy. Specifically, failure to adhere to this agreement will be considered improper use of the card and may be considered financial misconduct. Improper use includes, but is not limited to:
- Failure to justify the expense based on the [Use of University Resources and Financial Responsibilities](#) policy (Business purpose, reasonable, appropriate, and necessary-BRAN)
- Failure to provide receipts for each transaction placed on the University Credit Card
- Failure to reconcile University Credit Card transactions by the deadline established by the University Procurement office.
- Placing personal expenses on the University Credit Card
- Purchasing items that are not allowed, based on University policy.
- Sharing individual University Credit Cards with others
- Splitting transactions to circumvent University Credit Card limits or restrictions
- Submitting reimbursement requests for expenses that were purchased on a University Credit Card
- Supervisors placing their own travel or business expenses on a University Credit Card that they approve.

Departmental University Credit Card

If a departmental University Credit Card is issued, the cardholder is responsible for ensuring that others who use the University Credit Card are aware of the program requirements, as outlined in this agreement and the University Credit

Card policy. Additionally, the cardholder is responsible for keeping track of who has used the card and obtaining the necessary receipts and documentation for each transaction placed on the card. The [Department Card Sign Out Transaction Log](#) may be used to satisfy this recordkeeping requirement.

CERTIFICATION

Cardholder

My signature below certifies that I have read this agreement in its entirety understand it and agree to be bound by it and any subsequent amendments or addenda for as long as I am a University of Richmond University Credit Card cardholder. I also understand that if improper use of the University Credit Card is found (including using the University Credit Card for personal use), appropriate action will be taken as outlined in the [Reporting and Investigating Suspected Financial Fraud, Waste, and Abuse](#) policy.

Cardholder Signature _____ Date _____

Printed Name _____

***JP Morgan Chase PaymentNet Delegate (if different from the cardholder)**

My signature below certifies that I have read this agreement in its entirety, understand it, and agree to be bound by it and any subsequent amendments or addenda for as long as I am the delegate for the University of Richmond University Credit Card cardholder listed above.

Delegate Signature _____ Date _____

Printed Name _____ UR Email _____

Supervisor (Approver)

I certify that I am authorized to give approval for the individuals(s) listed above to participate in the University of Richmond credit card program. I agree to monitor the use of the University Credit Card and to review the charges placed on the University Credit Card to ensure the appropriateness of the charges as outlined in this agreement, the [University Credit Card](#) policy, the [Reporting and Investigating Suspected Financial Fraud, Waste, and Abuse](#) policy, and all other financial policies, as listed in the "Related Policies" section of the [University Credit Card](#) policy.

Additionally, I certify that I will not place my University business or travel and entertainment expenses on a University Credit Card for which I am the approver.

I will notify the University Credit Card Administrator if I suspect or detect improper use of the University Credit Card.

Supervisor/Approver Signature _____ Date _____

Printed Name _____ UR Email _____

FOR USE BY PROCUREMENT OFFICE ONLY

University Credit Card Ordered by: _____	Date Ordered: _____
University Credit Card Received by: _____	Date Received: _____
University Credit Card Issued by: _____	Date Issued: _____
Last 4-digits of University Credit Card #: ____	

